KMD WORKZONE

_mass dispatch

2021.1

User Guide

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User Guide for WorkZone Mass Dispatch 2021.1
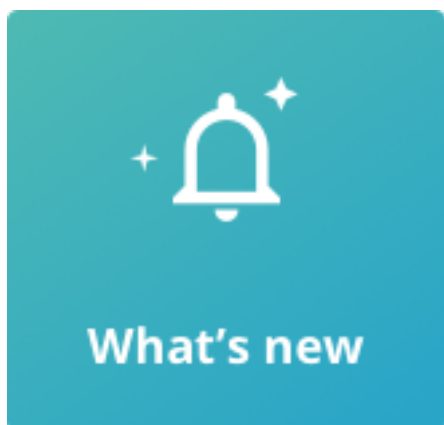
Related product documentation

- WorkZone Installation Guide

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

WorkZone Mass Dispatch 2021.1

This guide has been revised in connection with 2021.1 Hotfix 3.

WorkZone Mass Dispatch 2021.0

No changes in this release.

WorkZone Mass Dispatch 2020.3

Save letters on existing or new recipient cases

You can now save dispatched letters on individual recipient cases. The recipient cases can either be existing cases that you specify in the recipient list or new cases that are created based on a case template and information that you specify on a new **Recipient cases** tab in the **Start mass dispatch** dialog box. See Recipient list and Start a mass dispatch.

Custom sets of schema and data sheets for the Recipient list

You can add custom sets of schema and data sheets to your Excel workbook. For example, if your recipients are companies, you might want to create an inline custom set of schema and data sheet containing information about the company members. See Recipient list.

Mass dispatch performance improvements (WorkZone Process 2021.1 Hotfix 2)

With this hotfix release, WorkZone Mass Dispatch can send letters to up to 40,000 recipients in a mass dispatch.

Note that the dispatch time depends on your organization's hardware capacity and e-Boks. For example, it is possible to complete the actual dispatch of letters to 40,000 recipients within approximately 6 hours. This makes it possible to start a mass dispatch by the end of working hours and complete it before midnight.

Furthermore, you can expect that it takes an additional 10 hours until all receipts from e-Boks have been received and history documents are generated and saved in WorkZone. The Mass dispatch process has no influence on the time it takes for e-Boks to generate and send receipts. When WorkZone has received the receipts from e-Boks, the generation of history documents will start.

For more information about performance measures, please contact KMD WorkZone.

- To optimize the generation of validation reports and history documents, the documents are now in CSV format instead of PDF format. See Validate the recipient list and History documents.
- Administrators can now configure how many letters to send in a batch using a new BatchSize parameter.

WorkZone Mass Dispatch 2020.2

This is the first release of WorkZone Mass Dispatch for production.

> **Important:** The dispatch time depends on your organization's hardware capacity. In this first release, please note that it is recommended to mass dispatch to a maximum of 1000 recipients. The dispatch time for sending letters to 1000 recipients is approximately three hours.

WorkZone Mass Dispatch 2020.1

This is the first version of the guide.

> **Important:** This version is not to be used in production. Please install and use it only for testing purposes and share your feedback with us. We expect the production version in the 2020.2 release.

About WorkZone Mass Dispatch

Use WorkZone Mass Dispatch to send a large batch of letters to WorkZone contacts via e-Boks. Each letter will be populated with information that is relevant to a particular contact.

You start a mass dispatch from a case that holds a list of recipients in an Excel sheet and the letter template in a Word document that will be used for the dispatch. Before the letter is mass dispatched, the recipient list is validated and you have the option to correct errors based on a validation report.

The WorkZone Mass Dispatch process consists of the following steps:

1. Create a case to start and manage the mass dispatch from. This case is now the dispatch case.

2. Create a recipient list and save it on the dispatch case.

3. Create a letter template with merge fields in Word and save it on the dispatch case.

4. Start a mass dispatch process from the **Process** menu in WorkZone Client.

5. WorkZone Mass Dispatch validates the recipient list, checks if there are errors, and notifies you if errors are found by sending a smarttask/smartmail to you as the process owner. The task contains the letter template, the recipient list, and a validation report. You can then correct the errors based on the error descriptions listed in the validation report.

6. When the recipient list is validated without any errors, a sample letter to one recipient is generated for you to review.

7. When you are satisfied with the content of the letter, you can start the mass dispatch of the letters to the recipients in the recipient list.
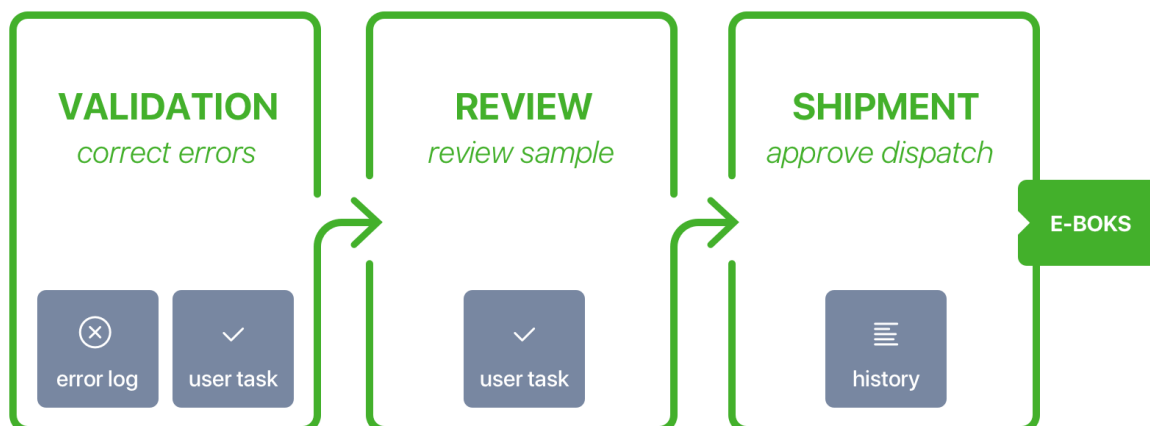
Recipient list

The recipient list is a Microsoft Excel workbook that contains a list of recipients and recipient details such as address information. The recipient list contains all WorkZone contacts that you want to send the letter to. See Recipient list.

Letter template

The letter template is a Microsoft Word document that includes body text and merge fields. The merge fields will be populated with values when WorkZone Mass Dispatch merges the template with contact information from the recipient list. See Letter template.

Start a process

When the recipient list and the letter template are ready, you can start the WorkZone Mass Dispatch process from the **Process** menu in WorkZone Client.

> **Prerequisite:** To start the WorkZone Mass Dispatch process, you must have the MASSDISPATCH access code.

In the **Start mass dispatch** dialog box, you can select a recipient list and a letter template.

Before you can send the full dispatch of letters, you must validate the recipient list and review the letter template.

Validation

The validation verifies requirements for the recipient list. See Validation. If the requirements are not met, you will receive a smarttask with a validation report that lists the errors. You can

then correct the errors before moving on to the next step. After the correction, you can validate the recipient list again to ensure that it is composed properly. Alternatively, you can cancel the mass dispatch.

Approve

The next step is to review and approve a sample of the letter before generating the entire batch of letters. WorkZone Mass Dispatch generates a sample letter and creates an approval task. If the letter does not satisfy your expectations, you can edit it, and then repeat validation and get a new approval task with a new sample letter. See Approve and send a mass dispatch.

Send

When you are satisfied with the letter, you are ready to send it to all the recipients on the recipient list as a mass dispatch.

> **Prerequisite:** To send letters using WorkZone Mass Dispatch, you must have the **MASSDISPATCHSEND** access code.

At this stage, contact information from the recipient list is merged with the letter template. WorkZone Mass Dispatch generates a PDF version of the letter and sends the letter to each recipient in the recipient list. The letters can be delivered via e-Boks. When the dispatch is complete, WorkZone generates a history document for each individual dispatch as well as one history document for the whole mass dispatch.

Prepare a mass dispatch

To send letters with WorkZone Mass Dispatch, you must first create a case for the dispatch, a dispatch case. This case contains the recipient list and the letter template and this is the case you start the mass dispatch from.
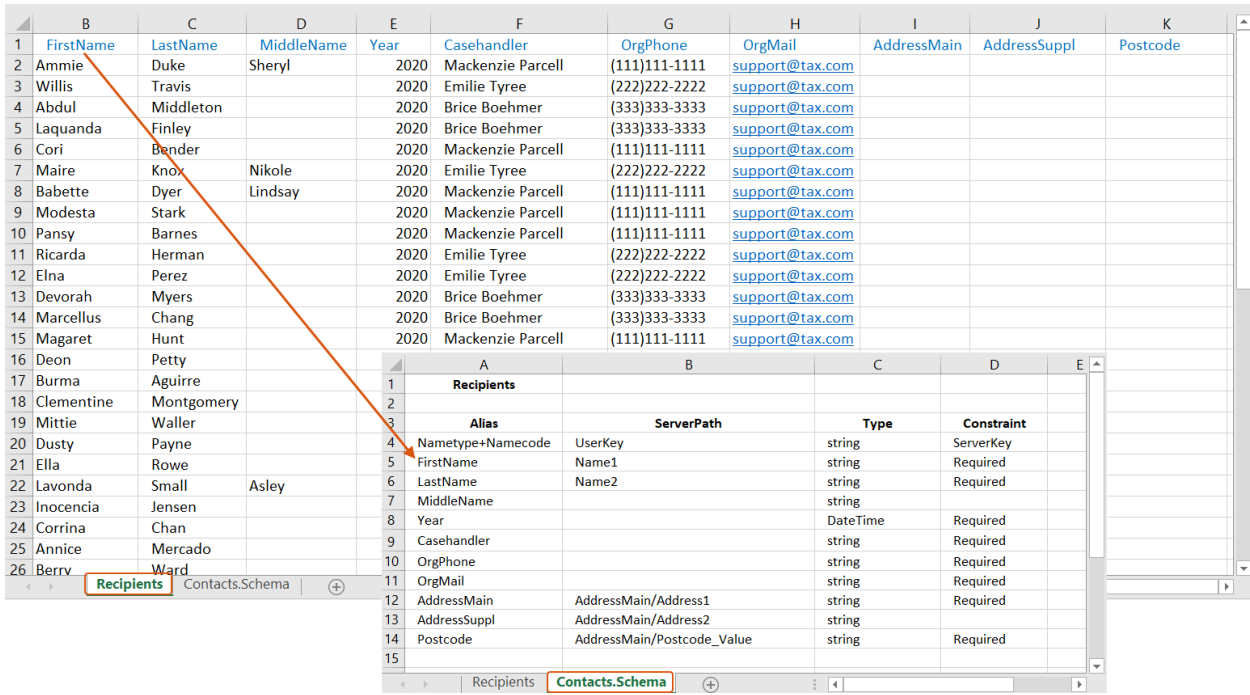
Recipient list

To send letters using WorkZone Mass Dispatch, you must create a recipient list. Each contact in the list will receive the letter.

The recipient list is a Microsoft Excel workbook with a mandatory set of two sheets describing the recipients: a schema sheet and a data sheet.

- **Contacts.Schema**–required name of the schema sheet. This sheet contains system information on the aliases specified in the data sheet or taken from the WorkZone database. The A1 cell must refer to the name of the data sheet.

- **Contacts**–the data sheet that you can name as you like. In the example below, it is named *Recipients*. The information from this sheet populates the letter template after you start the mass dispatch.

> **Note:** In this release, only schemas for contacts and cases (files) are supported. Schemas for documents (records) and custom fields are not supported.

	B	C	D	E	F	G	H	I	J	K
1	FirstName	LastName	MiddleName	Year	Casehandler	OrgPhone	OrgMail	AddressMain	AddressSuppl	Postcode
2	Ammie	Duke	Sheryl	2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
3	Willis	Travis		2020	Emilie Tyree	(222)222-2222	support@tax.com			
4	Abdul	Middleton		2020	Brice Boehmer	(333)333-3333	support@tax.com			
5	Laquanda	Finley		2020	Brice Boehmer	(333)333-3333	support@tax.com			
6	Cori	Bender		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
7	Maire	Knox	Nikole	2020	Emilie Tyree	(222)222-2222	support@tax.com			
8	Babette	Dyer	Lindsay	2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
9	Modesta	Stark		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
10	Pansy	Barnes		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
11	Ricarda	Herman		2020	Emilie Tyree	(222)222-2222	support@tax.com			
12	Elna	Perez		2020	Emilie Tyree	(222)222-2222	support@tax.com			
13	Devorah	Myers		2020	Brice Boehmer	(333)333-3333	support@tax.com			
14	Marcellus	Chang		2020	Brice Boehmer	(333)333-3333	support@tax.com			
15	Magaret	Hunt		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
16	Deon	Petty								
17	Burma	Aguirre								
18	Clementine	Montgomery								
19	Mittie	Waller								
20	Dusty	Payne								
21	Ella	Rowe								
22	Lavonda	Small	Asley							
23	Inocencia	Jensen								
24	Corrina	Chan								
25	Annice	Mercado								
26	Berry	Ward								

Recipients | Contacts.Schema

	A	B	C	D	E
1	**Recipients**				
2					
3	**Alias**	**ServerPath**	**Type**	**Constraint**	
4	Nametype+Namecode	UserKey	string	ServerKey	
5	FirstName	Name1	string	Required	
6	LastName	Name2	string	Required	
7	MiddleName		string		
8	Year		DateTime	Required	
9	Casehandler		string	Required	
10	OrgPhone		string	Required	
11	OrgMail		string	Required	
12	AddressMain	AddressMain/Address1	string	Required	
13	AddressSuppl	AddressMain/Address2	string		
14	Postcode	AddressMain/Postcode_Value	string	Required	
15					

Recipients | Contacts.Schema

If you want to save dispatched letters on individual cases per recipient, you can add another set of schema and data sheet to the Excel workbook:

- **Files.Schema**–required name of the schema sheet. This declares the relation of cases and recipients for the mass dispatch, and contains system information on the aliases specified in the data sheet or taken from the WorkZone database. The A1 cell must refer to the name of the data sheet.

- **Cases**–you can name the data sheet as you like. This sheet contains the cases on which the dispatched letters will be saved.

	A	B	C	D	E	F	G	H	I	J
1	Nametype+Namecode	CaseNo.	CaseGroup	Title	WriteAccess					
2	A00000000	00-000/0								
3	A00000001	00-000/1								
4	A00000002	00-000/2								
5	A00000003				{"Code":"CONFIGADM"}					
6	A00000004	00-000/4								
7	A00000005	00-000/5								
8	A00000006	00-000/6								
9	A00000007	00-000/7								
10	A00000008	00-000/8								
11	A00000009	00-000/9								
12	A11111110	11-111/0								
13	A11111111	11-111/1								
14	A11111112	11-111/2								
15	A11111113	11-111/3								
16	A11111114	11-111/4								
17	A11111115	11-111/5								
18	A11111116	11-111/6								
19	A11111117	11-111/7								
20	A11111118	11-111/8								
21	A11111119	11-111/9								
22	A22222220	22-222/0								

Recipients | Contacts.Schema | Cases | Files.Schema

	A	B	C	D	E	F	G	H	I	J	K
1	Cases										
2											
3	**Alias**	**ServerPath**	**Type**	**Constraint**							
4	Nametype+Namecode	UserKey	string	ServerKey							
5	CaseNo.	FileNo	string	ForeignKey							
6	CaseGroup	FileGroup_Value	string								
7	Title	Title	string								
8	WriteAccess	UpdateCode	json								
9											
10											
11											
12											
13											
14											
15											
16											
17											
18											
19											
20											
21											
22											

Recipients | Contacts.Schema | Cases | **Files.Schema**

The recipient cases can either be existing cases that you specify in the recipient list or new cases that are created based on a case template and information that you specify in the **Start mass dispatch** dialog box. See Start a mass dispatch (steps 10-11).

Contacts.Schema sheet

All strings on the **Contacts.Schema** tab are case-sensitive, except **Type**.

Example: This example shows the **Contacts.Schema** tab of a recipient list that contains basic personal information:

	A	B	C	D	E
1	**Recipients**				
2					
3	**Alias**	**ServerPath**	**Type**	**Constraint**	
4	Nametype+Namecode	UserKey	string	ServerKey	
5	FirstName	Name1	string	Required	
6	LastName	Name2	string	Required	
7	MiddleName		string		
8	Year		DateTime	Required	
9	Casehandler		string	Required	
10	OrgPhone		string	Required	
11	OrgMail		string	Required	
12	AddressMain	AddressMain/Address1	string	Required	
13	AddressSuppl	AddressMain/Address2	string		
14	Postcode	AddressMain/Postcode_Value	string	Required	
15					

| | Recipients | **Contacts.Schema** | ⊕ | | ◀ | ▶ |

The A1 cell refers to the name of the **Contacts** sheet. WorkZone Mass Dispatch requires a fixed structure of the recipient list to be able to process it, so you must define fields in this sheet as described in the table below.

Field name	
Alias	The field name used on the **Contacts** tab and in letter templates.
ServerPath	The path to the field values in WorkZone Content Server. If this field is empty, the information will be pulled not from the WorkZone Content Server but from the **Contacts** sheet.

> **Tip:** You can use WorkZone QueryBuilder to view available fields and their paths.

Field name

Type	This field is not case-sensitive. Enter one of these types:

- bool
- byte
- sbyte
- char
- decimal
- double
- float
- int

- uint
- long
- ulong
- short
- ushort
- string
- DateTime

Constraint	Enter **Required** if the field values cannot be empty.
	Enter **ServerKey** in the field that will be used as key.

Note: The DateTime field type is used for defining both date and time. In the letter template, change formatting in the merge field of the DateTime type to get a desired format of the date or time. See more in Tips for formatting date, currency, and number.

Contacts sheet

This **Contacts** sheet contains the WorkZone contacts that will receive the letters using WorkZone Mass Dispatch and the information regarding these contacts. In this sheet, columns represent the fields that are defined on the **Contacts.Schema** sheet, and rows represent values.

> **Note:** The contacts that you add to the recipient list must exist as WorkZone contacts for the mass dispatch process to send to these contacts. The validation will detect if the contacts exist. If a contact does not exist, the validation will add an error in the validation report. You can then create the missing contacts in WorkZone or you can choose to continue the mass dispatch process without sending to these contacts.

Example: Contacts sheet. In this example it is named *Recipients*.

	B	C	D	E	F	G	H	I	J	K
1	FirstName	LastName	MiddleName	Year	Casehandler	OrgPhone	OrgMail	AddressMain	AddressSuppl	Postcode
2	Ammie	Duke	Sheryl	2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
3	Willis	Travis		2020	Emilie Tyree	(222)222-2222	support@tax.com			
4	Abdul	Middleton		2020	Brice Boehmer	(333)333-3333	support@tax.com			
5	Laquanda	Finley		2020	Brice Boehmer	(333)333-3333	support@tax.com			
6	Cori	Bender		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
7	Maire	Knox	Nikole	2020	Emilie Tyree	(222)222-2222	support@tax.com			
8	Babette	Dyer	Lindsay	2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
9	Modesta	Stark		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
10	Pansy	Barnes		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
11	Ricarda	Herman		2020	Emilie Tyree	(222)222-2222	support@tax.com			
12	Elna	Perez		2020	Emilie Tyree	(222)222-2222	support@tax.com			
13	Devorah	Myers		2020	Brice Boehmer	(333)333-3333	support@tax.com			
14	Marcellus	Chang		2020	Brice Boehmer	(333)333-3333	support@tax.com			
15	Magaret	Hunt		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
16	Deon	Petty		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
17	Burma	Aguirre		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
18	Clementine	Montgomery		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
19	Mittie	Waller		2020	Brice Boehmer	(333)333-3333	support@tax.com			
20	Dusty	Payne		2020	Brice Boehmer	(333)333-3333	support@tax.com			
21	Ella	Rowe		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			
22	Lavonda	Small	Asley	2020	Brice Boehmer	(333)333-3333	support@tax.com			
23	Inocencia	Jensen		2020	Emilie Tyree	(222)222-2222	support@tax.com			
24	Corrina	Chan		2020	Emilie Tyree	(222)222-2222	support@tax.com			
25	Annice	Mercado		2020	Brice Boehmer	(333)333-3333	support@tax.com			
26	Berry	Ward		2020	Mackenzie Parcell	(111)111-1111	support@tax.com			

Recipients | Contacts.Schema | (+)

> **Note:** If a cell is empty and the server path is defined for the alias, the value will be taken from WorkZone Content Server. In the example above, the values for the *AddressMain*, *AddressSuppl*, and *ZIPcode* aliases will be populated from WorkZone Content Server.

Files.Schema sheet

The **Files.Schema** sheet is used to define the relation between cases and mass dispatch recipients.

The A1 cell refers to the name of the data sheet (in our example, **Cases** sheet). WorkZone Mass Dispatch requires a fixed structure of the fields to be able to process them, so you must define fields in this sheet as described in the table below.

Field name	
Alias	The field name used on the **Cases** sheet.
ServerPath	The path to the field values in WorkZone Content Server. You can use WorkZone QueryBuilder to view available fields and their paths.
Type	This field is not case-sensitive. Enter one of these types: • bool • uint • byte • long • sbyte • ulong • char • short • decimal • ushort

Field name

- double
- float
- int

- string
- DateTime
- json

Constraint	Enter **ServerKey** in the field that will be used as a Contact key.
	Enter **ForeignKey** in the field that points out the existing cases. In the example above, the cases with the numbers filled in the **CaseNo.** field on the **Cases** sheet will be used to store the documents that are sent.
	Fields with no constraints are used to create the new cases.

Cases sheet

The **Cases** sheet is a data sheet that contains the information that is required to find or create cases where the sent letters will be saved. The **Cases** sheet can only contain recipients that are also on the **Contacts** sheet.

In the **Cases** sheet, columns represent the fields that are defined on the **File.Schema** sheet, and rows represent values. The dispatched letters will be saved on the existing cases that are specified for the recipients. If a case number is not specified, a letter will be saved on a new case or on the dispatch case depending on the information that you specify in the **Start mass dispatch** dialog box. See Start a mass dispatch (step 10).

	A	B	C	D	E	F	G	H	I	J	
1	Nametype+Namecode	CaseNo.	CaseGroup	Title	WriteAccess						
2	A00000000	00-000/0									
3	A00000001	00-000/1									
4	A00000002	00-000/2									
5	A00000003				{"Code":"CONFIGADM"}						
6	A00000004	00-000/4									
7	A00000005	00-000/5									
8	A00000006	00-000/6									
9	A00000007	00-000/7									
10	A00000008	00-000/8									
11	A00000009	00-000/9									
12	A11111110	11-111/0									
13	A11111111	11-111/1									
14	A11111112	11-111/2									
15	A11111113	11-111/3									
16	A11111114	11-111/4									
17	A11111115	11-111/5									
18	A11111116	11-111/6									
19	A11111117	11-111/7									
20	A11111118	11-111/8									
21	A11111119	11-111/9									
22	A22222220	22-222/0									

Recipients | Contacts.Schema | **Cases** | Files.Schema

> **Note:** If a cell is empty and the server path is defined for the alias, the value will be taken from the template case specified in the **Recipient cases** tab of the **Start mass dispatch** dialog box.
>
> If a recipient is specified on the Contacts sheet but is not on the Cases sheet, a new case for such recipient will be created if the **Create recipient cases** check box is selected in the **Start mass dispatch** dialog box. See Start a mass dispatch (step 10).

Validation

To ensure a successful mass dispatch, the following requirements to the recipient list must be met:

- All fields are strictly aligned between the schema and data sheets. For example, all fields in the **Contacts.Schema** sheet must be present in the **Contacts** sheet, and all fields in **Contacts** sheet must be defined in the **Contacts.Schema** sheet.
- Alias and type must be filled in for each field.
- Each field has a unique alias and a unique server path.
- Server paths only contain letters, numbers, underscores, and slashes.
- Only one field is defined as **ServerKey**. Mind that the key values must be unique in WorkZone.
- If there is a defined **ServerKey** in the **Cases** data sheet, then it should correspond to the **ServerKey** in the **Contacts** data sheet.

Letter template

A letter template is a Microsoft Word document that you want to send to recipients using WorkZone Mass Dispatch. The template includes the mandatory opening and closing merge fields and the body of the letter with merge fields. The merge fields will be populated with values when the template is merged with the contact and case information from the recipient list. The values represent information for each particular contact or case such as name, address, and other data.

> **Note:** In this release, only contact and case information (both standard and custom fields) can be merged into the letter template.

> **Important:** Apart from the **ServerKey** field, you must add all fields defined on the schema sheet to the letter template. The **ServerKey** field can be skipped. If you no longer need a specific field in a letter template, you can remove it from the schema sheet. If you want to keep fields in the schema sheets but you do not want to use these fields as merge fields in the letter template, you can use a white font to hide the fields in the letter template.

Create a letter template

The structure of merge fields is the following: in curly braces, MERGEFIELD and then the alias of the field, for example, { MERGEFIELD FirstName }.

1. Press **Alt + F9** to view merge fields in curly braces.

2. Insert opening and closing merge fields for contact and case information in the letter template using Quick Parts in Word.

The opening and closing merge fields are:

- Contact: `{MERGEFIELD TableStart:Recipients }` and `{MERGEFIELD TableEnd:Recipients }`.

- Case: `{MERGEFIELD TableStart:Cases }` and `{MERGEFIELD TableEnd:Cases }`.

In this example, the Excel sheet that contains the contact information is named *Recipients* and the sheet that contains the case information is named *Cases*.

On the **Insert** tab in Word, click **Quick Parts** > **Field**, and then select **Merge field** from the list of field names. Enter the opening merge field, for example `{MERGEFIELD TableStart:Recipients }`, in the **Field name** field. Repeat this step for each of the opening/closing merge fields, you want to insert.

{ MERGEFIELD TableStart:Recipients }

{ MERGEFIELD TableStart:Cases }

{ MERGEFIELD TableEnd:Cases }

{ MERGEFIELD TableEnd:Recipients }
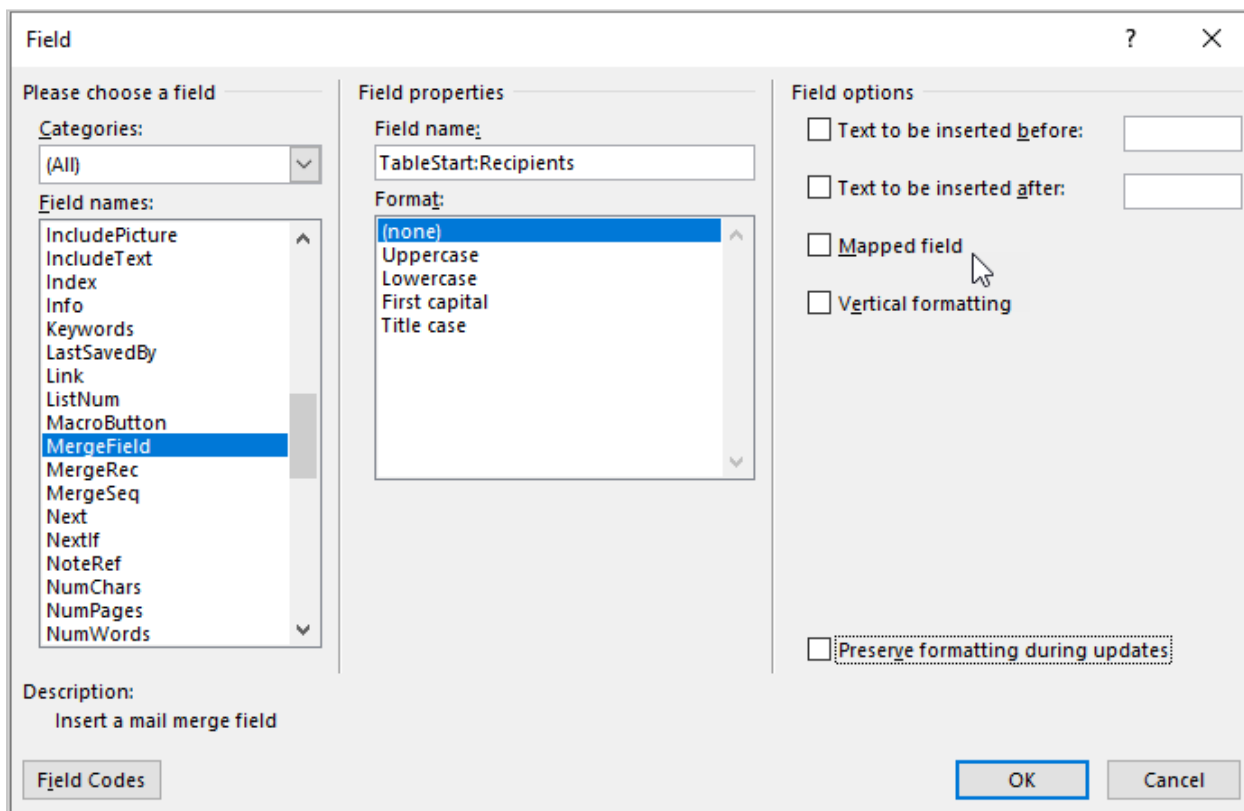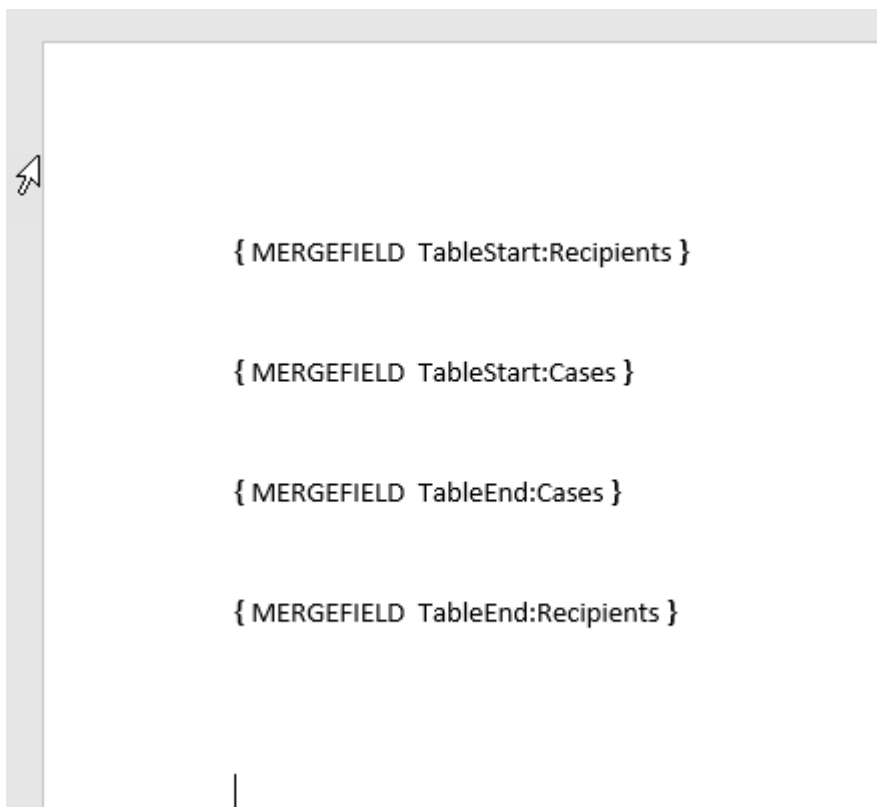
3. Type the body text of the letter template and add merge fields as appropriate in the text. The body of the letter must be placed between the starting and closing merge fields.

    You can use the Quick Parts to add the merge fields in the same way as you insert the opening and closing merge fields.
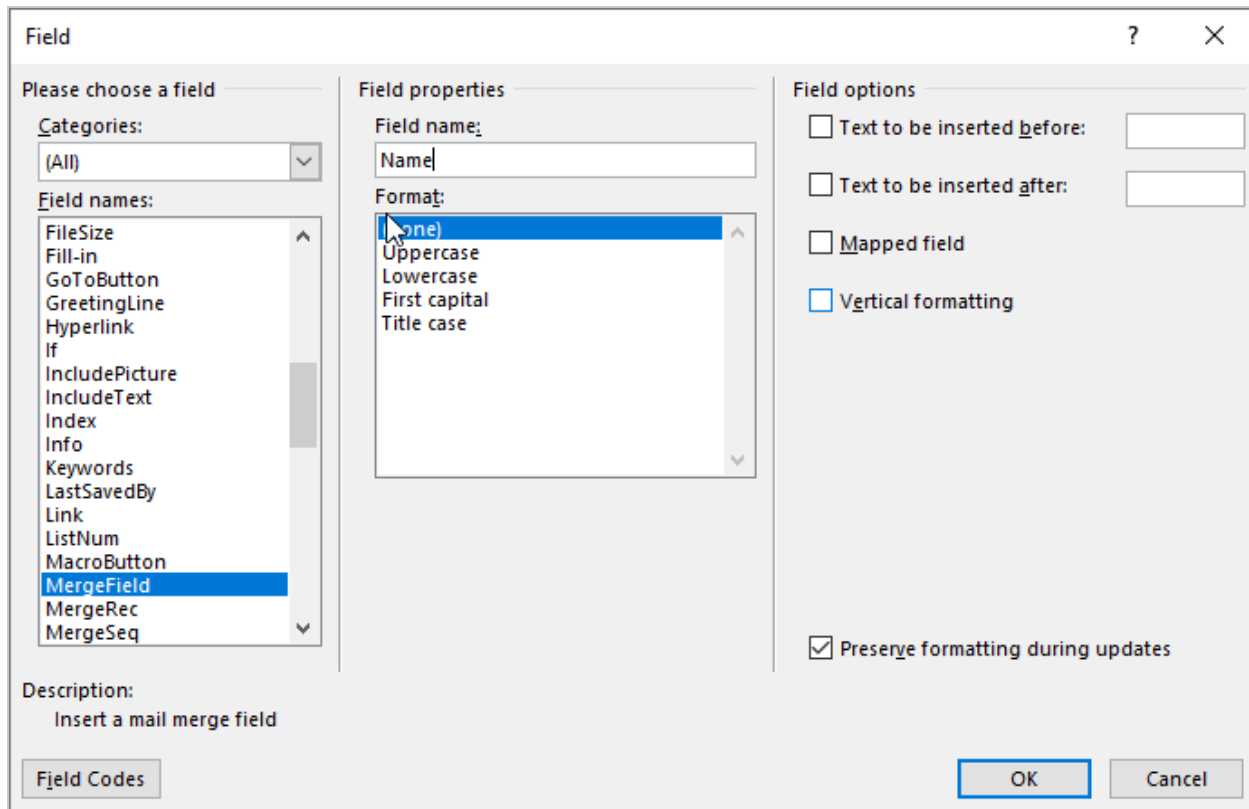
Important: With the exception of the **ServerKey** field, you must add <u>all</u> fields from the schema sheets to the letter template. You can hide the fields that you do not want to use in the letter template by using a white font or a small font size.

4. Alternatively, you can connect to a local copy of the recipient list from Word. Go to **Mailings** > **Select Recipients** > **Use an Existing List** and select the Excel file with the recipient list. In the **Select table** dialog box, select the **Contacts** table, leave the **First row of data contains column headers option** selected, and then click **OK**.

5. Type the body of your letter. Use **Insert Merge Field** of the **Mailings** tab to add a

merge field when you need to include the information from the recipient list.
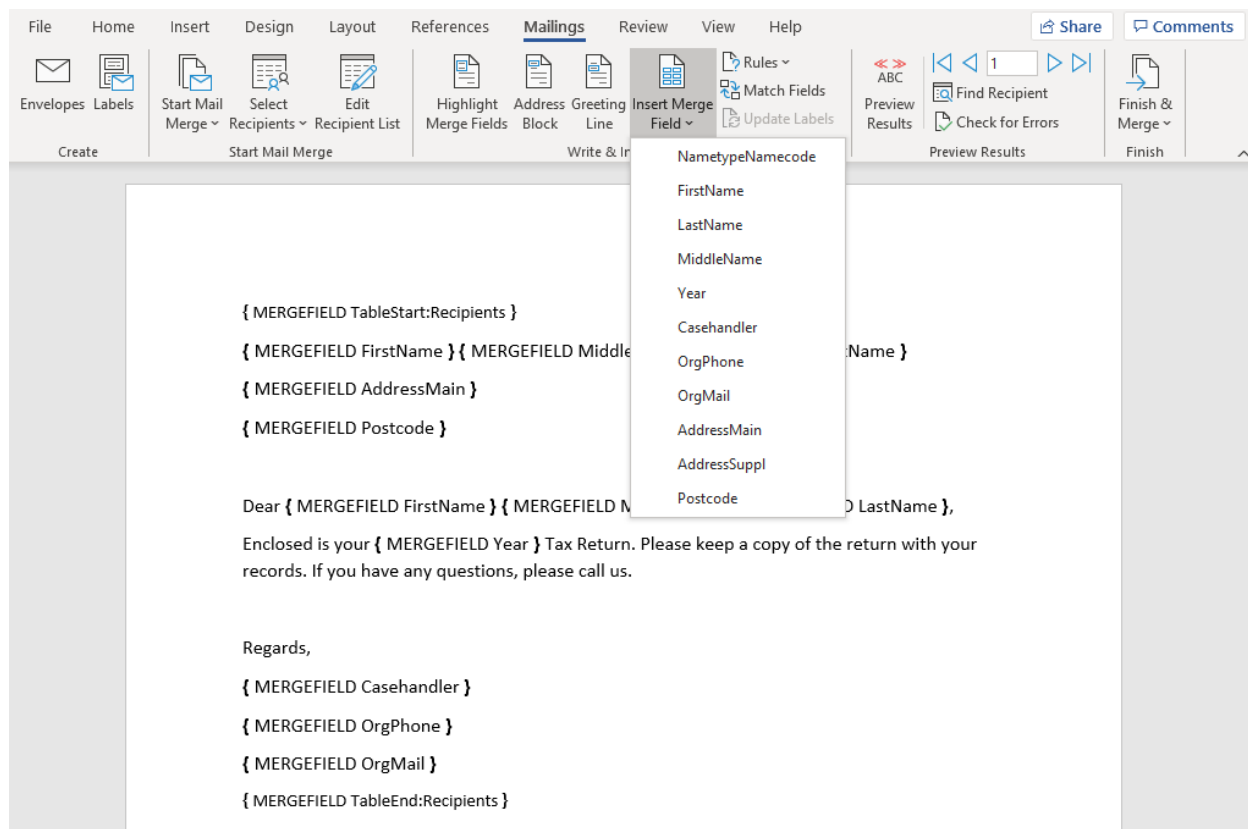
> **Tip:** You can preview your letter by selecting **Preview Results** in the **Mailings** tab in Microsoft Word.

6. Repeat steps 4-5 if you want to insert merge fields from for the Cases table in the letter.

7. Save your changes.

Tips for formatting date, currency, and number

Use a switch in Microsoft Word to format the results of the merge field. You can change the date, time, currency, and number format in your letter template to whatever you like.

1. Select the merge field you want to change.

2. Press **Alt + F9** to view the field coding in Microsoft Word. The field you have selected should now look like this: `{ MERGEFIELD Date }`.

3. Add the formatting data to the merge field using the numeric picture switch (`\#`) for currency and number fields or the date-time picture switch (`\@`) for date fields. See some examples below.

4. Right-click the merge field and select **Update Field**.

Date field code with picture switch and format specifiers	Displayed in the letter
`{ MERGEFIELD Date\@ "MMMM d, yyyy" }`	March 29, 2021
`{ MERGEFIELD Date\@ "dd/MMM/yy" }`	29/Mar/21
`{ MERGEFIELD Date\@ "d MMMM yyyy" }`	29 March 2021

See more about date and time format specifiers in the Microsoft documentation.

Numeric field code with picture switch and format specifiers	Displayed in the letter
`{ MERGEFIELD Amount\# $,0.00 }`	$1220.00
`{ MERGEFIELD Amount\# 0 }`	1220
`{ MERGEFIELD Amount\# $,0 }`	$1,220

See more about the numeric format specifiers in the Microsoft documentation.

Start a mass dispatch

You start and send a mass dispatch from WorkZone Client. The mass dispatch process consists of the following steps:

Start a mass dispatch

You start and send a mass dispatch from WorkZone Client. The mass dispatch process consists of the three steps:

1. Start a mass dispatch

2. Validate the recipient list

3. Approve and send a mass dispatch

> **Prerequisites:**
>
> - You must be assigned the **MASSDISPATCH** access code to start a mass dispatch process.
>
> - You must be assigned the **MASSDISPATCHSEND** access code to be able to send a mass dispatch.
>
> - You have prepared a Recipient list and a Letter template and saved them on a case. This case is now the dispatch case, where you manage the mass dispatch.

Start a mass dispatch

1. In WorkZone Client, open the dispatch case that the recipient list and the letter template are saved on.

2. Click **Process** > **Start Mass Dispatch**.

3. Enter a title of the mass dispatch process in the **Title** field. The title will be used as the name of the Mass dispatch process and as the title of the email that is sent to the recipient's inbox in e-Boks. By default, the title of the current case is used. When you select a letter, the title changes to the name of the letter automatically. You can change the title.

4. In the **Recipient list** field, select the recipient list you want to use. Select the Excel workbook that holds the recipients you want to send the letter to. See Recipient list.

5. In the **Letter** field, select the letter template you want to use.

6. In the **Excluded CPR status codes** field, select the status codes that you want to exclude from the dispatch, for example, **80, Inactive, emigrated** or **90, Inactive, dead**.

    For example, if you select **80, Inactive, emigrated**, recipients with this status code will not receive a letter even if they are included in the recipient list. The validation report will list the recipients that have been excluded from the mass dispatch because of their status code.

7. Select a dispatch sequence in the **Dispatch sequence** field. The dispatch sequence must only contain an e-Boks dispatcher as this is the only dispatcher that Mass dispatch supports.

    > **Note:** If you see the message *"The recipient with id <CPR number> is not subscribing to the material ID <material ID>"?*, you are trying to send the message to a recipient who is not registered as an e-Boks user. See [SmartPost FAQ](#) to solve this issue.

8. Select a material in the **e-Boks material** field. The materials on the list are defined by your organization and e-Boks. For example, you may be able to select a material that enables the recipients to reply to the message that you are about to send.

9. Select the **Send to case handler** check box, if you want the case handler to review and approve the mass dispatch. Note that the case handler must have the **MASSDISPATCHSEND** access code to review and approve a mass dispatch. If you leave the check box cleared, you will, as the process owner be the approver of the mass dispatch.

10. Click the **Recipient cases** tab if you want to create a new case for each of the recipients in the mass dispatch and save the letter on the new cases. If you do not want to create new recipient cases, you can skip the steps 10-11.

11. On the **Recipient cases** tab, select the **Create recipient cases** check box, and fill in required information about the case title, case group, and case template you want to base the creation of new recipient cases on.

When recipient cases are created, they will get the case title and the case group that you have specified on the **Recipient cases** tab. Other information can also be retrieved from the Files.Schema sheet and from the selected case template. In the case template you can specify additional meta data that you want to be added to the recipient cases, for example a case text or state.

New cases will not be created for the recipients that have references to existing cases in the Cases sheet (using a foreign key column).

Case title template	Specify how you want the case titles of the new recipient cases to be created. You can use the columns names from the **Contacts.Schema sheet** to define the title template. Specify the column names in curly brackets. `{name1} {name2} — {namecode}` Results in, for example, the case title: Amy Duke – 210206-8621

> **Note:** The title that you specify in the **Case title template** field overwrites the title that is specified in the Cases sheet.

Case group	Select the case group you want to apply to new recipient cases. Other case data ares either taken from the recipient list or from the case template that you select in the **Case template** field. > **Note:** The case group that you specify in the **Case group** field overwrites the case group that is specified in the Cases sheet.
Case template	Select a case template you want to use as template for new recipient cases. In the case template, you can specify which meta data that you want to be added to new cases by default, for example case type, case state, or case text. See Create a case template. The case that you use as the case template must have the case group **TEMPLATES, Template case group** to be available for selection in the **Case template** field.

12. Click **Start** to start the mass dispatch. The validation of the recipient list will start.

13. Click the **Processes** tab and double-click the process to open it in the preview pane where you can follow the progress and open tasks that are related to the process.
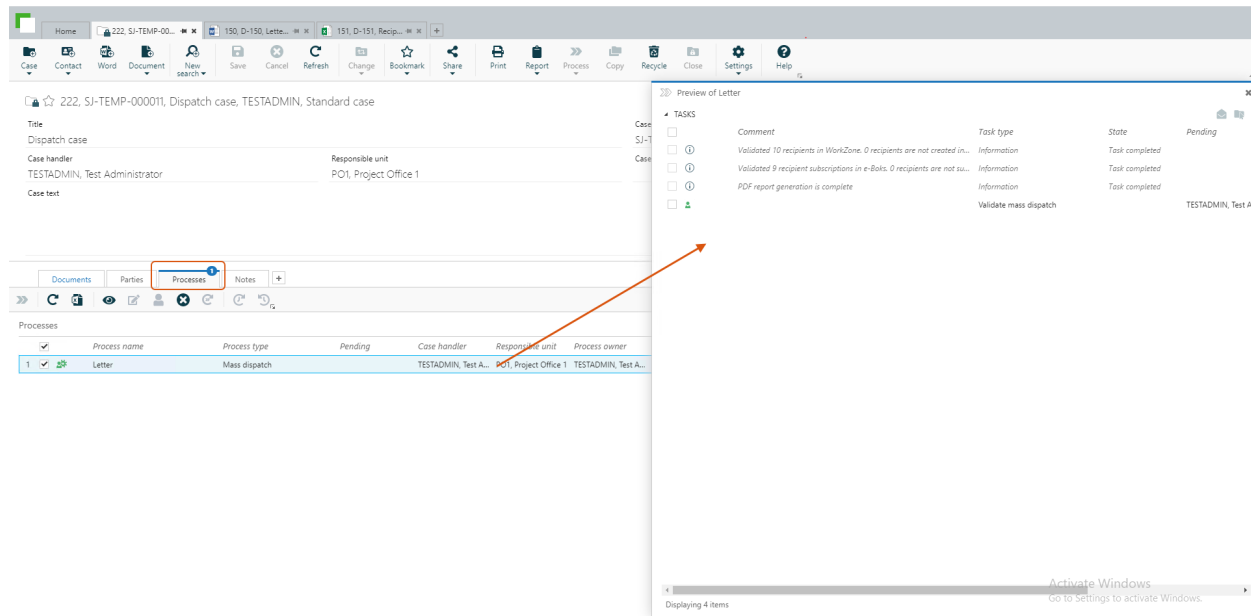
14. If the validation of the recipient list fails, you will receive a **Validate mass dispatch** task, see Validate the recipient list. If the validation is successful, the mass dispatch process continues directly to the approval step and you will, as the process owner, receive an **Approve mass dispatch** task. See Approve and send a mass dispatch.

Validate the recipient list

When you click **Start** in the **Start mass dispatch** dialog box, the Mass dispatch process starts validating the recipients in the recipient list. If there are errors in the recipient list, you as the process owner will receive a **Validate mass dispatch** smarttask/smartmail.

1. Open the task from the preview pane in WorkZone Client or as a smartmail in Outlook similarly to other processes. The task contains the letter template, the

recipient list, and a validation report.

2. In the smarttask/smartmail, you have the following options:

- Click **Repeat** if you want to repeat the validation after you have corrected errors in the recipient list. You can base your corrections on the error descriptions listed in the validation report. You can repeat this step until you are satisfied with the recipient list.

- Click **Cancel** to cancel the mass dispatch and delete the validation report from the dispatch case.

- Click **Accept** to accept the content of the recipient list and move on to the approval of the mass dispatch.

For information about working with tasks, see [Work with tasks](#) in the WorkZone Process User Guide.

Correct errors in the recipient list

1. In the **Validate mass dispatch** task, click the validation report to open it.

2. Preview or open the report. The report lists the recipients that do not fulfill the requirements for the recipient list and an error description next to the recipients.

A1	▼	⋮	×	✓	*fx*	RecipientCode,ValidationError

	A
1	RecipientCode,ValidationError
2	,The contact C220306-8630 has duplicates.
3	,The contact C210206-8621 was not found in WorkZone.
4	,The contact C260206-8636 was not found in WorkZone.
5	,The contact C271106-8689 was not found in WorkZone.
6	,The contact V37130680 was not found in WorkZone.
7	,The contact J35020683 was not found in WorkZone.
8	,The contact J30110684 was not found in WorkZone.
9	,The contact C250806-8665 was not found in WorkZone.
10	,The contact C280806-8616 was not found in WorkZone.
11	,The contact V36010681 was not found in WorkZone.

The report lists all errors in the recipient list. Examples of errors may be:

- Requirements to the structure of the recipient list are not fulfilled. Check and correct errors in the Excel sheet based on the error messages listed in the validation report. See Recipient list.

- Contacts in the recipient list do not exist as WorkZone contacts.

- Some required fields in the recipient list do not have values in WorkZone. In this case, you can either remove **Required** from the field in the recipient list if it is not required information, or you can add the missing information to the contacts in WorkZone.

  For a list of errors and possible solutions, see Error handling.

3. Click **Repeat** in the **Validate mass dispatch** task to repeat the validation until you are satisfied with the recipient list.

4. Click **Accept** when you are satisfied with the recipient list and ready to proceed with the mass dispatch.

When you click **Accept**, a sample letter is generated based on the letter template and one recipient from the recipient list. As the process owner you will receive an **Approve mass dispatch** smarttask/smartmail. See Approve and send a mass dispatch.

Correct errors in the letter template

If there are errors in the letter template, the dispatch will fail and you will receive a **Mass dispatch failed** task/smartmail with the error.

If the letter template does not contain the same fields as the fields that are defined in the recipient list, you can either add or remove the fields from the letter template in Microsoft Word or remove the fields from the recipient list. The fields must match.

1. Click **Done** to close the **Mass dispatch failed** task. The mass dispatch will be canceled.

2. Correct the errors in the template and start the Mass dispatch process again.

Approve and send a mass dispatch

As the process owner you will receive an **Approve mass dispatch** task/smartmail when the recipient list is validated successfully and there are no errors in the letter template.

1. Open the task from the preview pane in WorkZone Client or as a smartmail in Outlook similarly to other processes. The task contains a sample letter , the recipient list, and the letter template.

2. In the task, you have the following options:

- Click **Approve** if you are satisfied with the sample letter and want to start dis-patching the letters.

- Click **Repeat** if you made corrections to the sample letter or the recipient list. The validation is repeated and you will receive a new approval task with a new sample letter.

- Click **Cancel** to cancel the mass dispatch. All documents that have been gen-erated are deleted from the dispatch case.

- Click **Forward** if you want to forward the approval to another user.

> **Note:** If the contact information is updated after you have approved a mass dispatch, the updated contact information will not be merged with the letter. You need to execute the mass dispatch validation process again to use the latest updated information.

What happens after approval?

When you approve the mass dispatch, WorkZone creates the letters and merges data in to the merge fields in the letters. WorkZone sends the letters to e-Boks. When e-Boks has dispatched all the letters, receipts are returned to WorkZone and History documents are generated. The generated letters and history documents are saved on the dispatch case or on individual recipient cases if you have specified existing cases in the recipient list and/or defined that new cases are created based on the options on the **Recipient cases** tab in the **Start mass dispatch** dialog box.

> **Note:** If e-Boks returns an error in the receipt, the error will be handled according to the same rules as configured for SmartPost. See [e-Boks errors](#) in the WorkZone ProcessAdministrator Guide.

Save letters on the dispatch case

If you do not specify a recipient case for each of the recipients in the recipient list, the letters will be saved on the dispatch case together with a Mass dispatch history document for the entire dispatch and history documents for each of the dispatches. The individual history document is saved as a supplementary document on the letter document. See History documents.

Save letters on recipient cases

In the Cases sheet in the recipient list, you can specify a recipient case for each of the recipients or you can specify individual field values for case creation. Creation of new cases requires that you have you have selected the **Create recipient cases** check box and have filled in the options on the **Recipient cases** tab in the **Start mass dispatch** dialog box, see the steps 10-11.

Depending on how the case sheet in recipient list is defined and your settings on the **Recipient cases** tab when you started the mass dispatch, the following happens:

- If there is no case specified in the recipient list, and you have selected the **Create recipient cases** check box and specified the options for new recipient cases on the **Recipient cases** tab, the letters and history documents will be saved on newly created cases. See the steps 10-11 under Start a mass dispatch.

- If a case is specified for each recipient in the recipient list and the cases exist, the letters and history documents will be saved on the specified cases. See Cases sheet.

- If a case is specified but it does not exist in WorkZone, the validation will generate an error for the recipient which will be shown in the validation report.

History documents

When a mass dispatch process is complete, WorkZone generates one history document for the entire dispatch and one history document for each individual dispatch. The mass dispatch history documents are documents that summarize the actions during the mass dispatch process. The history documents are in CSV format. You can open the history documents in Excel to view information about the dispatches. If needed save the CSV file as an Excel workbook to process it further in Excel.

The history document for the entire mass dispatch includes a list of the recipients with information about the individual dispatches.

Example: History document for the complete mass dispatch

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	RecipientCode,EboksSubscriber,RecordKey_Value,ExternalId,ShipmentDate,ReceiptDate,ShipmentState_Summary,ShipmentError												
2	210206-8621,True,72,0044356373593011732200002,17-09-2020 07:01:58,17-09-2020 07:03:16,Completed,												
3	271106-8689,True,73,0044356373593011732200005,17-09-2020 07:01:58,17-09-2020 07:03:16,Completed,												
4	250806-8665,True,74,0044356373593011732200001,17-09-2020 07:01:58,17-09-2020 07:03:16,Completed,												
5	220306-8630,True,75,0044356373593011732200004,17-09-2020 07:01:58,17-09-2020 07:03:16,Completed,												
6	280806-8616,True,76,0044356373593011732200000,17-09-2020 07:01:58,17-09-2020 07:03:16,Completed,												
7	260206-8636,True,77,0044356373593011732200003,17-09-2020 07:01:58,17-09-2020 07:03:16,Completed,												

The history documents contain the following information:

Field	Description
RecipientCode	The ID of the recipient, for example a CPR or CVR number.
EboksSubscriber	If the value is True, the recipient is registered as an e-Boks user.

Field	Description
RecordKey_Value	The document number of the letter that was sent to the recipient.
ExternalId	External ID, which is used to track the delivery of the dispatch. If the message is sent through e-Boks and the field contains an ID, it means that the dispatch is completed and that e-Boks has acknowledged the receipt of the message.
ShipmentDate	The dispatch date and time of the letter.
ReceiptDate	The date and time that the letter was received by e-Boks and e-Boks has generated a receipt.
ShipmentState_Summary	Shows the status of the dispatch that was sent to each recipient. If the dispatch was successful, the status will be **Completed**. If it has failed, an error code and a description will be shown in the **Dispatch Error** field.
ShipmentError	An error code and a description will be shown next to each recipient who did not receive the letter.

Save letters on the dispatch case

If you have decided to save all the generated letters on the dispatch case, the history document for each dispatch will be saved as a supplementary document on the letter as shown below. The history document for the entire dispatch is also saved on the dispatch case.

Save letters on recipient cases

If you have decided to save the generated letters on individual recipient cases, the history document for each dispatch is saved on the recipient case as a supplementary document to the letter. The history document for the entire dispatch is saved on the dispatch case.

Error handling

WorkZone validates the mass dispatch during the different steps of the process and error messages are shown in the validation report and in the **Mass dispatch failed** task/smartmail.

The table below lists the errors grouped by type of error.

- WorkZone
- Recipient list
- Letter template
- e-Boks

English	Danish	Additional information
WorkZone		

English	Danish	Additional information
The {0} values in the {1} recipient list differ from the values in WorkZone.	Værdierne for {0} i mod-tagerlisten {0} er for-skellige fra værdierne i WorkZone.	The values specified for the contacts in the recipient list are different from the contact values in WorkZone. Align the contact information in the recipient list with contact information in WorkZone or vice versa.
The {0} values are miss-ing.	Værdierne for {0} mangler.	The values specified for the contact in the recipient list are missing in WorkZone. Add the missing information to the WorkZone contact.
The CPR status code {0} is excluded from dispatch.	CPR-statuskoden {0} er udeladt fra forsendelsen.	In the **Send mass dispatch** dialog box, you have selected to exclude recipients with specific CPR status codes from the mass dispatch. For example, recipients with the status code **80, Inactive, emigrated**. Remove the status code from the **Excluded status codes** field in the **Send mass dispatch** dialog box, if you want to send letters to this recip-ient.
The contact {0} was not found in WorkZone.	Kontakten {0} blev ikke fun-det i WorkZone.	Contacts in the recipient list must exist as WorkZone contacts. Create the contact in WorkZone or delete the contact from the recipient list if you do not want to send the let-ter to the contact.
Recipient list		
An issue occurred in a schema for entity {0}.	Der opstod et problem i et skema for enheden {0}.	This message is a container for the specific errors in the Excel workbook

English	Danish	Additional information
		that holds the recipient list.
The value "{0}" cannot be converted to {1}.	Værdien "{0}" kan ikke konverteres til {1}.	The format of the values specified in the Excel workbook (for example, in the **Recipient list** sheet) does not match the types defined in the Schema.
The contact {0} has duplicates.	Kontakten {0} har dubletter.	The contact must be unique in the recipient list. Delete the duplicate.
The column {0} was not found.	Kolonnen {0} kunne ikke findes.	The columns in the Schema sheet of the Excel workbook do not exist in the sheet containing the data. For example, if the Schema sheet describes columns A, B, and C, but the sheet with data contains only the A and B columns, you will see the error message for the C column.
The following columns need mappings: {0}.	Følgende kolonner mangler tilknytninger: {0}.	The columns in the sheet of the Excel workbook containing the data do not exist in the Schema sheet. For example, if the Schema sheet describes columns A, B, and C, but the sheet with data contains only the A and B columns, you will see the error message for the C column.
The worksheet {0} was not found.	Regnearket {0} kunne ikke findes.	The Excel workbook that holds the recipient list is missing a sheet. The workbook must contain at least a sheet with recipients (optional naming) and a **Contacts.Schema** sheet. If you want to save dispatched letters on specific cases, the workbook must also contain a sheet with cases

English	Danish	Additional information
		(optional naming) and a **Files.Schema** sheet.
Server paths can only contain letters, numbers, underscores, and slashes.	Serverstier må kun indeholde bogstaver, tal, understregningstegn og skråstreger.	The path does not correspond to the path to the field values in WorkZone Content Server (i.e., OData URI).
The server path that is used as a server key cannot contain a reference to another entity.	Den serversti der er angivet som servernøgle må ikke indeholde henvisninger til en anden enhed.	The fields of the nested objects cannot be used as server keys. For example, if a Recipient has a nested object called **Address**, which has a **Postcode** field, you cannot use **Postcode** as a server key.
The type {0} is unsupported.	Typen {0} understøttes ikke.	See supported types in Contacts.Schema sheet.
An alias is required.	Alias er påkrævet.	An alias for a field name used on the **Contacts** sheet does not have a corresponding alias on the **Contacts.Schema** sheet. The field names and aliases must be aligned.
An alias has a ServerKey constraint but the ServerPath column is empty. Please enter a server path.	Et alias har en ServerKey-begrænsning men kolonnen ServerPath er tom. Indtast venligst en serversti.	The ServerPath value is mandatory
A type is required.	Type er påkrævet.	The **Type** field on the **Contacts.Schema** sheet is empty for one or more fields. Add the type. See supported types in Contacts.Schema sheet.
The ServerPath cannot contain empty segments.	ServerPath må ikke indeholde tomme segmenter.	The path does not correspond to the path to the field values in WorkZone

English	Danish	Additional information
		Content Server (i.e., OData URI).
The property {0} must refer to a primitive data value, for example string, integer, date, etc.	Egenskaben {0} skal henvise til en primitiv dataværdi, for eksempel, streng, heltal, dato, eller lignende.	The nested objects cannot be used as fields. For example, if a Recipient has a nested object called **Address**, you cannot use **Address** but can use its fields (**Street**, **Postcode**, etc.).
Mappings with the aliases {0} have duplicates.	Tilknytninger med aliasserne {0} har dubletter.	Please correct the mappings with the same aliases in the Recipient list.
Mappings with the aliases {0} refer to same value in the ServerPaths column.	Tilknytninger med aliasserne {0} henviser til den samme værdi i kolonnen ServerPaths.	Please correct the mappings with the same ServerPaths in the Recipient list.
There are issues with the mappings.	Der opstod problemer med tilknytningerne.	This message is a container for the specific errors in the Excel workbook that holds the recipient list.
An entity must be specified in the Alias column.	Der skal angives en enhed i kolonnen Alias.	The schema has no alias in the A1 cell which should refer to the name of the Contacts sheet.
Entity name is required.	Navn på enhed er påkrævet.	The entity name must be specified in the name of the Schema sheet of the Excel workbook: for example, **Contacts** in the **Contacts.Schema**.
Entity name is required.	Navn på enhed er påkrævet.	The entity name must be specified in the name of the Schema sheet of the Excel workbook: for example, **Contacts** in the **Contacts.Schema**.
No mappings were found.	Der blev ikke fundet nogen tilknytninger.	The mappings are missing in the Contacts.schema sheet in the recipient list.
ServerKey cannot be	ServerKey må ikke være	The Schema must contain only one

English	Danish	Additional information
empty and must only contain one mapping.	tomt og må kun indeholde en tilknytning.	ServerKey value. Please add one ServerKey if you have not added it before or delete extra ServerKeys if you have added more than one.
Letter template		
An issue occurred in the letter template.	Der opstod et problem i brevskabelonen.	This message is a container for the specific errors in the Word document that holds the letter template.
The tables {0} in the letter template do not refer to the relevant data sources (for example, the recipient list).	Tabellerne {0} i brevskabelonen henviser ikke til de relevante datakilder (for eksempel modtagerlisten).	Please check that the opening and closing merge fields of your letter template have the correct reference to the Excel workbook. For example, if your **Contacts** sheet is called **Recipients**, then your opening and closing fields must be `{MERGEFIELD TableStart:Recipients }` and `{MERGEFIELD TableEnd:Recipients }`.
"Data with alias {0} does not have corresponding MERGEFIELD TableStart/MERGEFIELD TableEnd fields in the letter template.	"Data med alias {0} har ikke de tilsvarende felter MERGEFIELD TableStart/MERGEFIELD TableEnd i brevskabelonen.	Please check that the letter template has the opening and closing merge fields that are specified in the Excel workbook. For example, if your **Contacts** sheet is called **Recipients**, then your opening and closing fields must be `{MERGEFIELD TableStart:Recipients }` and `{MERGEFIELD TableEnd:Recipients }`.
The following fields in the letter template do not refer to the relevant data sources: {0}.	Følgende felter i brevskabelonen henviser ikke til de relevante datakilder: {0}.	The letter template contains fields that are not mapped on the Contacts.schema sheet in the recipient list.

English	Danish	Additional information
The following mappings are missing in letter template: {0}.	Følgende tilknytninger mangler i brevskabelonen: {0}.	The recipient list contains mappings on the Contacts.schema sheet that are not used in the letter template. The fields in the recipient list and in the letter template must be identical.
e-Boks		
The contact {0} is not registered as an e-Boks user.	Kontakten {0} er ikke registreret som e-Boks bruger.	The recipient is not registered as an e-Boks user. The Mass dispatch process will try to send the letter using the next dispatcher in dispatch sequence.

Create a case template

You can create a case that can be used as a template for adding meta data to new recipient cases that are created automatically by the Mass dispatch process. The meta data that you specify in the case template will be applied by default to new recipient cases unless the same meta data are specified in the Cases sheet in the recipient list. Then the values from the Cases sheet will be applied to the new cases. For example, if you have specified a case state for specific cases in the Cases sheet and a different case state is specified in the case template, the case state from the Cases sheet will be applied to the new recipient cases.

Meta data that will always be added to the recipient cases:

- The case title and case group that you select on the **Recipient cases** tab in the **Start mass dispatch** dialog box when you start a mass dispatch will always be applied to the new recipient cases. See step 10 in Start a mass dispatch.
- The access code that is specified on the template case.

Create a template case

Prerequisite: The meta data fields that you specify in the case template must also be defined in the Files.Schema sheet. If the fields are not defined, the values will not be read from the template case, and thus not applied to the new recipient cases.

1. Create a case and fill in the fields with the values that you want to be added to the new recipient cases that are created by the Mass dispatch process.
2. In the **Case group** field, select **TEMPLATES, Template case group** to make the template case available for selection in the **Case template** field on the **Recipient cases** tab in the **Start mass dispatch** dialog box.
3. Save the case.

Configure WorkZone Mass Dispatch

> **Note:** This topic is targeted at WorkZone administrators who will configure WorkZone Mass Dispatch

> **Prerequisites:**
>
> - SmartPost must be activated and configured.
> - An e-Boks dispatcher that is configured to use the Digital Post 2 must exist.
>
>   See [Configure dispatchers](#) in the WorkZone Process Administrator Guide.

You configure Mass dispatch in WorkZone Configurator.

1. In WorkZone Configurator, go to **Process** > **Processes**.
2. Point to the **Mass dispatch** process.
3. Click (≡) **Edit process parameters**.
4. Enter values for the parameters.

> **Note:** Some of the Mass dispatch parameters are similar to SmartPost process parameters.

Parameter	Default	Description
SPDocumentSource		Select the origin of the created SmartPost message. The possible settings correspond to the entries in the custom domain ACTOPR, for example SP, SmartPost, DP, Digital Post, and

Parameter	Default	Description
		so on. The organization must provide this information. The setting is shown on the document in the **Origin** field in WorkZone Client.
MaxCombinedMessageLength	10485760 (10 MB)	When a user starts a Mass dispatch process, the Mass dispatch process calculates an estimated size of each of the messages sent to the recipients. Before the Mass dispatch process continues the process, the estimated size is compared with the **MaxCombinedMessageLength** setting. If the estimated size exceeds the specified value, the user is asked to reduce the size of the documents and then try to send the message again.
		The reason for this is that large documents may cause the Workflow Host to run out of memory later in the flow, which causes workflows to be terminated without the user being notified.
		Generally, the default value is used.
DefaultMaterialId		The e-Boks material that will be selected by default in the **Start mass dispatch** dialog box.
		To configure e-Boks materials,

Parameter	Default	Description
		click **Process** > **E-boks material**. See [Configure e-Boks materials](#) in the WorkZone Process Administrator Guide and [e-Boks materials](#) in the WorkZone Configurator Administrator Guide.
DefaultDispatcherSequenceId		The default dispatch sequence that will be selected by default in the **Startmass dispatch** dialog box. **Important:** The selected dispatch sequence must have e-Boks as the first dispatcher. To configure dispatch sequences, click **Process** > **Dispatch sequences**. See [Configure Dispatch Sequences](#) in the WorkZone Process Administrator Guide and [Dispatch Sequences](#) in the WorkZone Configurator Administrator Guide. **Important:** Verify this value after successful installation. After installation, the dispatch

Parameter	Default	Description
		sequences may have been renumbered.
DefaultRemotePrintTypeId		The print type that will be selected by default in the **Startmass dispatch** dialog box. To create or reconfigure print types, click **Process** > **Print types**. See [Configure print types](#) in the WorkZone Process Administrator Guide and [Print types](#) in the WorkZone ConfiguratorAdministrator Guide.
ReportId		Select the report you want to use for the history document.
ValidationReportId		Select the report you want to use for the validation report.
RecipientReportId		Select the report you want to user for the recipient report.
RecordType	PROHIST	The document type of the history document that is generated by the Mass dispatch process.
RecordState		The document state of the history document that is generated by the Mass dispatch process.
TitleTemplate	{0}: {1} {2}	A template that is used to create the title of the history document. By default, the template has placeholders for the process

Parameter	Default	Description
		type {0}, the process title {1}, and a date stamp {2}.
		Note: This parameter is not yet implemented for WorkZone Mass Dispatch. The title of the history document will always be: Mass dispatch: Mass dispatch history ('date').
ValidationProperty		Select the custom document field that holds the values.
ValidationValues		Specify which custom document values are allowed. Users will only be able to select documents (letter document and attachments) with these values in the **Start mass dispatch** dialog box.
DocClassificationThresHold		The maximum document classification that is allowed to be used with the Mass dispatch process. Documents with higher classifications than specified for this parameter will not be available for selection in the **Start mass dispatch** dialog box.
DefaultExcludedCprStatuses		Select the CPR status codes that you want to exclude from the mass dispatch. You can select **80, Inactive, emigrated** or **90, Inactive, dead**.

Parameter	Default	Description
		The status codes that you specify will be shown as default values in the **Start mass dispatch** dialog box.
BatchSize	200	Specify how many letters you want the Mass dispatch process to send in a batch. The batch size affects performance and the frequency of status updates that are shown in the preview pane in WorkZone Client.
		You can set the batch size from 0 and up to 5000 letters. If you set the batch size to 0, all letters will be sent at the same time.
		A batch size between 200 and 1000 letters is recommended.
		The default batch size is 200 letters.

See also [Processes](#) in the WorkZone Configurator Administrator Guide.

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